

Online Inquiry Form (JotForm) - Customer-Specific

Description	Provider will develop a customer-specific integration with JotForm, using a standard online inquiry web form
Assumptions	Customer environment is on the latest software version Customer environment already contains configuration to support to collection of Account Leads, Opportunities and/or Event Opportunities. Customer has provided all necessary details, mappings, and external API access prior to development.
Limitations	The development includes one custom form. Excluding, set-up or modifications to the Customer's configuration of Account Leads, Opportunities and/or Event Opportunities. The development includes one form. Any additional forms or modifications to the existing form are not covered under this scope and will require a separate agreement and development effort. Any changes to the form need to be validated as they can break the service importing the data. If the Customer wants to add a single sign-on to protect the form, they must license JotForm individually. It allows the configuration of the Identity Provider directly within JotForm.
Kick Off	Provider responsibility: Internal handover and preparation A 30 minute remote kick off meeting with preparation Customer responsibility: Ensure key project resources and stakeholders attend kick off meeting Raise any risks, blackout periods for software release, resourcing plan
Discovery	Provider responsibility: A 1 hour remote discovery to review current process and validate the needs Customer responsibility: Ensure key resources can attend all discovery sessions Provide an understanding of business processes, data and requirements
Design	Provider responsibility: Provider will design the form with the Customer then set up the technical implementation and mapping Customer responsibility: Supporting the specification process with resources and 3rd party access if needed.
Build	Provider responsibility: Online Inquiry Form Web-Service includes: -Creation of Online Inquiry Form including adjustment of questions (reorder, remove, change questions, additions not supported), form color, logos, and minor font modifications from custom Form -OIF publishing resources can be Embed code, Source code, iFrame, or link Customer responsibility: As this is a Customer-specific development, it is essential to note that resources on the Customer side must be allocated for activities such as specification, mapping, and testing throughout the development and implementation process. Their active involvement and availability will be essential to a successful outcome.
Training	Not applicable
Testing	Provider responsibility: Unit testing and Customer testing assistance (up to 1 hour) Customer responsibility: Customer is responsible for preparing for and executing user testing, including creation of test plans, test cases, and test scripts. Ensure key resources attend all testing meetings The testing phase will be no more than 1 week in duration
Launch & Post Launch	Provider responsibility: Go live support. Post Launch activities will be completed in no more than 1 week Customer responsibility: Raise any issues found (that are within the scope of the SOW) via the Provider issue log template Complete customer satisfaction survey
Project Management	Provider responsibility: Creation and maintenance of project record Coordination of resources, activities, meetings in alignment with timelines and milestones Ownership of issues log and delegation of tasks Customer responsibility: Nominated project lead Ensure key resources attend all weekly project review meetings to provide updates Coordination of activity and resources on customer side to align to project plan and schedule
Exclusions	Services not specifically defined in the scope above Once the build phase begins, any further requirements are considered to be out of scope Any licenses for 3rd party software or tools needed for the development. If the Customer-specific requirements are more effort than this package includes, then the scope of work is custom, and Technical Services will provide a custom estimate and scope of work through a change order.

Estimated length of project: 4 weeks

Note: This is an estimate and is dependent on Customer cooperation, timely responses and availability of necessary resources.